

*This brochure supplement provides information about Robert Thomas Deitrick that supplements the Polaris Financial Partners, LLC brochure. You should have received a copy of that brochure. Please contact Robert Thomas Deitrick if you did not receive Polaris Financial Partners, LLC's brochure or if you have any questions about the contents of this supplement.*

*Additional information about Robert Thomas Deitrick is also available on the SEC's website at [www.adviserinfo.sec.gov](http://www.adviserinfo.sec.gov).*

## **Polaris Financial Partners, LLC**

Form ADV Part 2B – Individual Disclosure Brochure

*for*

**Robert Thomas Deitrick**

Personal CRD Number: 1158292

Investment Adviser Representative

Polaris Financial Partners, LLC  
470 Olde Worthington Road Suite 450  
Westerville, OH 43082  
(614) 901-3400  
[bdeitrick@pfp.llc](mailto:bdeitrick@pfp.llc)

UPDATED: 06/14/2021

## Item 2: Educational Background and Business Experience

**Name:** Robert Thomas Deitrick                      **Born:** 1961

### **Educational Background and Professional Designations:**

#### **Education:**

Economics Finance and Economics, The Ohio State University - 1984

#### **Business Background:**

01/2003 - Present	CEO Polaris Financial Partners, LLC
02/2010 - Present	Investment Adviser Representative Cadaret Grant & Co Inc.
02/2010 - Present	Registered Representative Cadaret Grant & Co Inc.

## Item 3: Disciplinary Information

There are no legal or disciplinary events that are material to a client's or prospective client's evaluation of this advisory business.

## Item 4: Other Business Activities

Robert Thomas Deitrick is a registered representative and an investment advisor representative of Cadaret, Grant & Co., Inc. From time to time, he will offer clients advice or products from those activities. Clients should be aware that these services pay a commission or other compensation and involve a conflict of interest, as commissionable products conflict with the fiduciary duties of a registered investment adviser. Polaris Financial Partners, LLC always acts in the best interest of the client, including with respect to the sale of commissionable products to advisory clients.

Robert Thomas Deitrick is the Managing Member of The Polaris Pointe of St. Croix, USVI, LLC.

Clients always have the right to decide whether or not to utilize the services of any Polaris Financial Partners, LLC representative in such individual's outside capacities.

### **Item 5: Additional Compensation**

Robert Thomas Deitrick does not receive any economic benefit from any person, company, or organization, other than Polaris Financial Partners, LLC in exchange for providing clients advisory services through Polaris Financial Partners, LLC.

### **Item 6: Supervision**

As a representative of Polaris Financial Partners, LLC, Robert Thomas Deitrick is supervised by Steven T Morgan, the firm's Chief Compliance Officer. Steven T Morgan is responsible for ensuring that Robert Thomas Deitrick adheres to all required regulations regarding the activities of an Investment Adviser Representative, as well as all policies and procedures outlined in the firm's Code of Ethics and compliance manual. The phone number for Steven T Morgan is (614) 901-3400.

## Item 7: Requirements For State Registered Advisers

*This disclosure is required by state securities authorities and is provided for your use in evaluating this investment advisor representative's suitability.*

- A. Robert Thomas Deitrick has NOT been involved in any of the events listed below.
1. An award or otherwise being found liable in an arbitration claim alleging damages in excess of \$2,500, involving any of the following:
    - a) an investment or an investment-related business or activity;
    - b) fraud, false statement(s), or omissions;
    - c) theft, embezzlement, or other wrongful taking of property;
    - d) bribery, forgery, counterfeiting, or extortion; or
    - e) dishonest, unfair, or unethical practices.
  2. An award or otherwise being found liable in a civil, self-regulatory organization, or administrative proceeding involving any of the following:
    - a) an investment or an investment-related business or activity;
    - b) fraud, false statement(s), or omissions;
    - c) theft, embezzlement, or other wrongful taking of property;
    - d) bribery, forgery, counterfeiting, or extortion; or
    - e) dishonest, unfair, or unethical practices.
- B. Robert Thomas Deitrick has NOT been the subject of a bankruptcy.